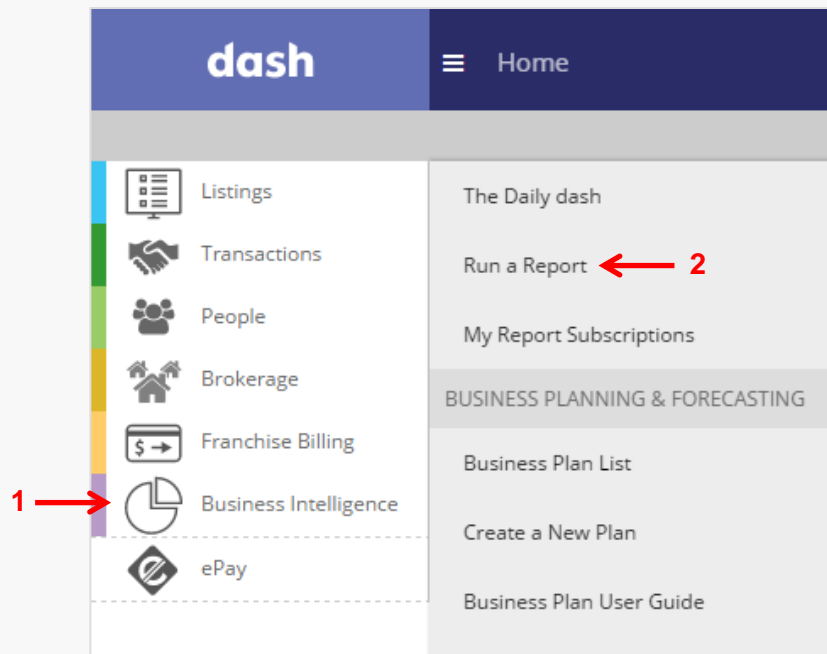# View and Run Reports

Depending on the role assigned to you in dash, you may be able to view and run various reports.

For a list of the reports that each role may view, print and export, refer to Page 4 of this guide.
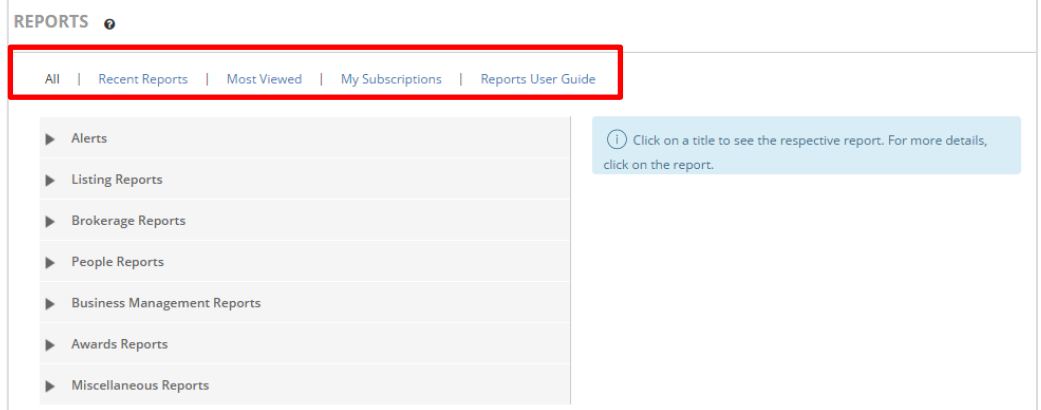

1. Click **Business Intelligence** on the left navigation menu.
2. Click **Run a Report.**
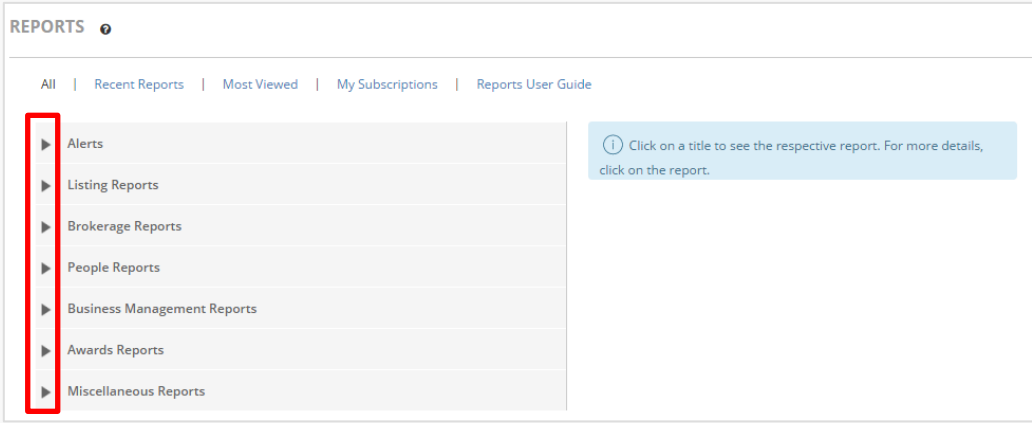
The **Reports** screen displays.

3. Click the tabs at the top to view:

   - All reports available to you
   - Recent Reports that you have run
   - Reports that you have viewed most often
   - Reports that you have subscribed to
   - A user guide that walks you through running and viewing reports

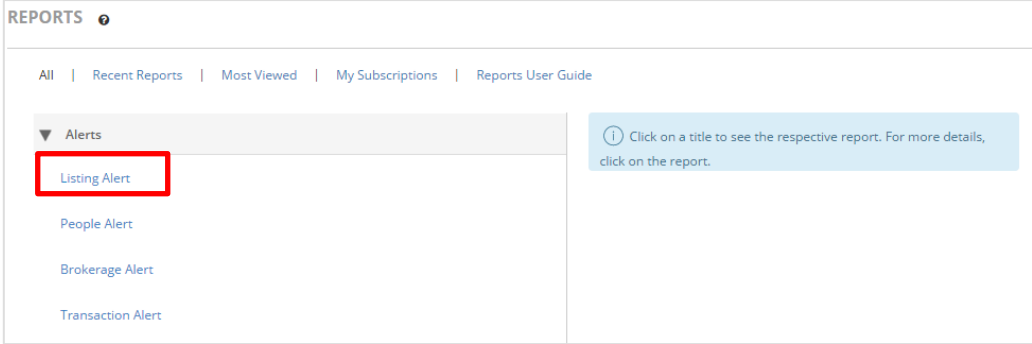4. Click the arrow next to a report section to expand it.

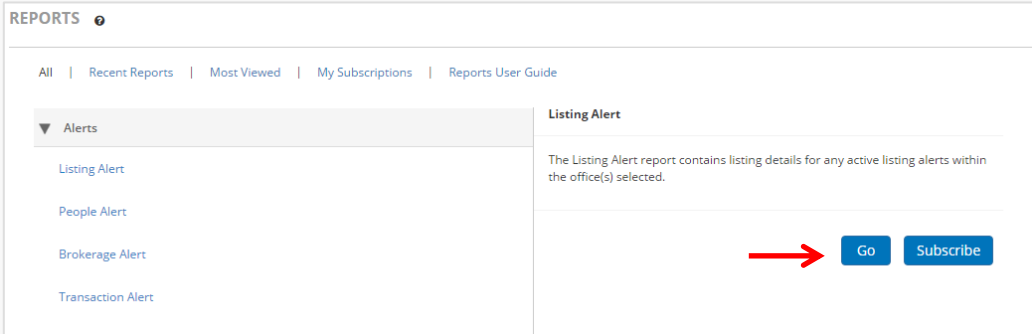In this example, we will open the **Alerts** section.

REPORTS

All | Recent Reports | Most Viewed | My Subscriptions | Reports User Guide

▶ Alerts
▶ Listing Reports
▶ Brokerage Reports
▶ People Reports
▶ Business Management Reports
▶ Awards Reports
▶ Miscellaneous Reports

Click on a title to see the respective report. For more details, click on the report.

A list of reports available in the section displays.

5. Click the report you would like to run.

In this example, we will click **Listing Alert.**

REPORTS

All | Recent Reports | Most Viewed | My Subscriptions | Reports User Guide

▼ Alerts
Listing Alert
People Alert
Brokerage Alert
Transaction Alert

Click on a title to see the respective report. For more details, click on the report.

The description of the report displays on the right.

6. Click **Go**.

REPORTS

All | Recent Reports | Most Viewed | My Subscriptions | Reports User Guide

▼ Alerts
Listing Alert
People Alert
Brokerage Alert
Transaction Alert

Listing Alert

The Listing Alert report contains listing details for any active listing alerts within the office(s) selected.

Go   Subscribe

7. Select the **Export Type** for your report (Excel or PDF)

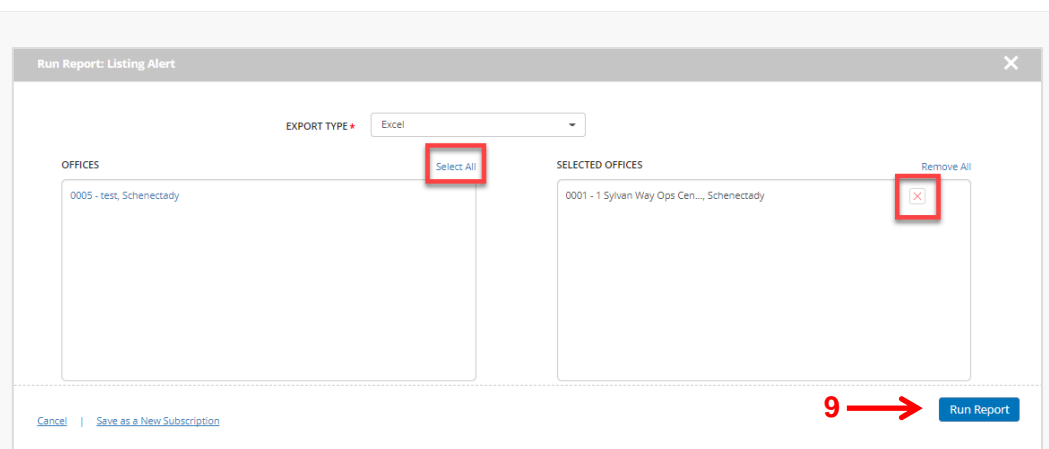Note: Some reports may only be available in one format.
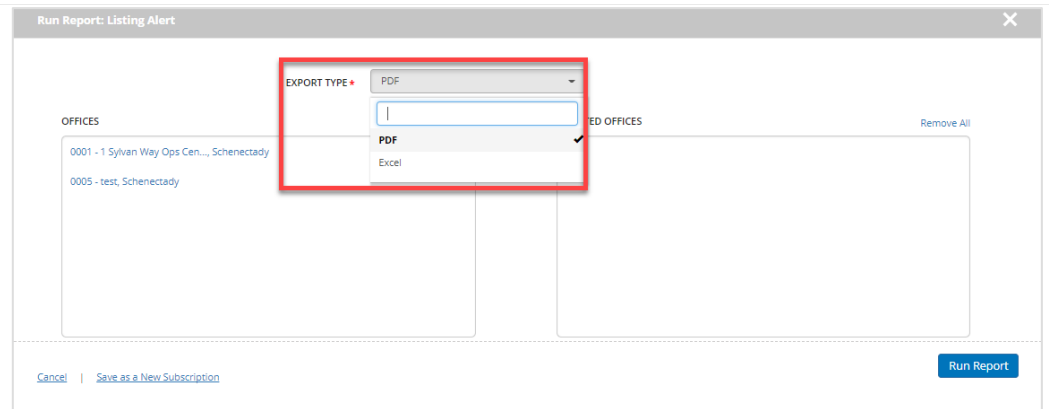
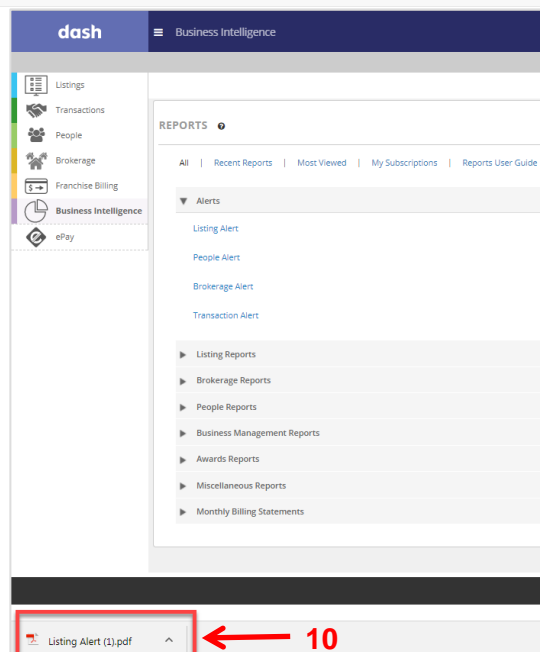The office selection window displays.

8. Click an office on the left to include the office in the report, or click **Select All** to include all offices.

   To remove an office from the report, click **X** next to the office name on the right.

9. Click **Run Report**.

10. Click on the report to open it.

The chart below shows the various reports that the different roles in dash may view, print and export.

Please note that some reports may not apply to your brand.

Reports / Roles	Listing Alerts	People Alerts	Transaction Alerts	Brokerage Alerts	Special Program Status Report	Listing Inventory Report	Special Programs Listings Report	Open House Report	Commercial Listing Percentage	Closed Business Journal	Area Served Report	Agent Anniversary Report	Recruiting and Termination Report	Consumer Mailing List Report	Office Detail Report	Sales Representative Performace Report	Broker Pending Report	Lease, Property Management, and Rental Report	Staff Roster Report	Sales Associate Production Detail Report	Sales Associate Production Summary Report	Business Analysis Report	Office Production by Sales Associate Report	Production Summary Report	Sales and List Price Analysis Report	Sales Mix Report	Trend Report	Business Drivers Report	Leading Indicators Report	Operational Efficiency Report	Award Eligibility Report - Company/Office Level	CO95 - Producer Awards Summary Report	CO98 - Top 21 Ranking Summary Report	Preliminary Designation Report	Agent Pacing Report	Daily Activity Report	Data Import Status Report	User Permission Report
Roles																																						
Brokerage Admin	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Office Manager	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Company Data Entry																																						
Finance Management															x																							
Transaction Coordinator			x							x		x	x			x	x																					
Listing Coordinator	x				x	x	x	x	x							x																						
Listing Data Entry	x				x	x	x	x	x																													
Resource Mgr w/Security Admin		x										x	x						x																			x
Resource Mgr		x										x	x						x																			
Sales Agent	x				x	x	x	x																														
Sales Agent (read only)	x				x	x	x	x																														
Read Only	x	x	x		x	x	x	x	x										x																			